



**Report Jobs (CSV)**  
Scheduling Directory Reports

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<b>AUTHOR</b>	Docusnap Consulting
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## 1. Purpose of this Document

This document describes how you can comfortably create, schedule, and distribute a large number of directory reports using a CSV import wizard. We recommend that you test this reporting method with a non-productive sample, following the instructions in this document.

### 1.1 Application Example

In a company, the persons who are responsible for critical directory structures (owners) must check periodically whether the specific shares have been granted to the right people and whether the permissions are appropriate (ShareOwners). The data required for such a check must be provided by the IT department.

DocuSnap is able to record all required data automatically at predefined intervals and sends out descriptive reports in multiple formats to these owners at desired predefined times.

Initially, a scheduled job must be created in DocuSnap for each report. In many cases, it is necessary to schedule a great number of reports. By using the "Report Jobs (csv)" feature, you can significantly reduce the time required for this task.

### 1.2 Prerequisites

This HowTo document is mainly limited to explaining the *Report Jobs (csv)* feature. We assume that you already know the basics of how DocuSnap IT Security module and the Directory Reports (Resource) feature work.

### 1.3 Structure of the CSV File for Automated Reporting

You can create the data, i.e. the fully qualified domain name (FQDN), the host name, the report starting point (share or directory path), and the recipient of automated e-mail in Excel and then save them as a CSV file. The Mail column is optional; all other columns must contain valid entries:

Domain; Host; Share\Path; Mail

Domain	Host	Share\Path	Mail
dsra.local	DSFS01	Accounting	docusnap@docusnap.com
dsra.local	DSFS01	Accounting\Global	docusnap@docusnap.com
dsra.local	DSFS01	Accounting\Munich	docusnap@docusnap.com

Figure 1 – Excel data for the CSV file

This is the Excel export as a structured text file (in CSV format):

```
Domain;Host;Share\Path;Mail
dsra.local;DSFS01;Accounting;docusnap@docusnap.com
dsra.local;DSFS01;Accounting\Global;docusnap@docusnap.com
dsra.local;DSFS01;Accounting\Munich;docusnap@docusnap.com
```

Figure 2 – Creating the CSV file: structured text file

**Note:** Creating the CSV file via Excel is only one of the many ways to create a valid CSV file. Docusnap supports ANSI and UTF-8 encoding.

## 2. Creating Automated Directory Reports

### 2.1 Step 1 – Company Selection

Besides the company and the language, you can specify where the created documents will be stored in the file system using the “Alternative Documentation Path” option. If you do not specify a location here, all documents will be stored in the default Docusnap documentation path. For a detailed description of this dialog, refer to the [User Manual](#).

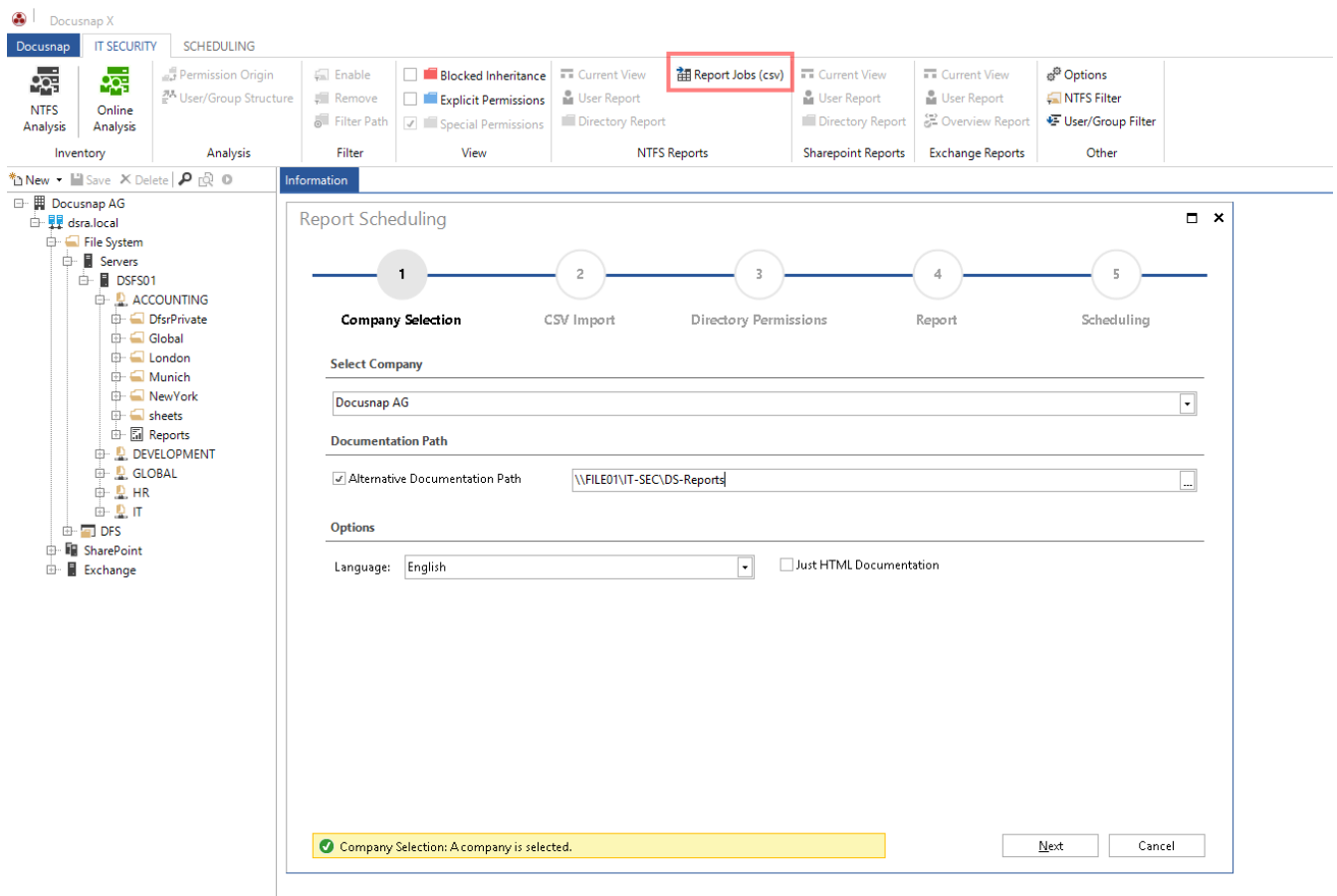


Figure 3 – Company selection

## 2.2 Step 2 – CSV Import Wizard

The CSV file created before must now be imported to DocuSnap. To do so, start the *Report Jobs (csv)* wizard in the IT Security module and select the CSV file you created. If the csv file includes a heading, as in this example, enable the *First Row as Header* checkbox.

The example shown here includes all supported variants of the *SHARE\PATH* column.

- Shares (here: **Accounting**) are supported
- Hidden shares (here: **C\$**) are supported
- You can also select a directory below a share as the starting point for the directory report (here: **Accounting\Global**)

Report Scheduling □ ×

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Company Selection      **CSV Import**      Directory Permissions      Report      Scheduling

---

**CSV Import**

File:  ⋮ ⓘ

First Row as Header

<input checked="" type="checkbox"/>	DOMAIN	HOST	SHARE\PATH	MAIL
<input checked="" type="checkbox"/> <span style="font-size: small;">W</span>	dsra.local	DSFS01	Accounting	docusnap@docusnap.com
<input checked="" type="checkbox"/> <span style="font-size: small;">W</span>	dsra.local	DSFS01	Accounting\Global	docusnap@docusnap.com
<input checked="" type="checkbox"/> <span style="font-size: small;">W</span>	dsra.local	DSFS01	Accounting\Munich	docusnap@docusnap.com

Figure 4 – Wizard: Importing the CSV file

**Note:** DocuSnap performs multiple plausibility checks. At the time of the CSV import, the shares listed in the CSV file must be accessible. If any entries are invalid, these rows are grayed out and will not be considered for further processing.

## 2.3 Step 3 – Configuring the Directory Report

In the *Directory Permissions* step, you can specify the contents, scope, and representation of the directory reports to be created. These settings apply to all directory reports created with this wizard. If you would like to have a different setting for specific directory reports, you need to schedule these reports separately.

### 2.3.1 Levels

If you do not make any changes, the report will start by default one level below the entry point (share or directory as specified in the CSV file). You can specify the depth by entering the number of levels or by enabling the *Show All Levels* checkbox:

#### Levels

---

Levels:   Show all Levels

Figure 5 – Configuring the directory report: Specifying the number of levels

### 2.3.2 Settings

For an explanation of all settings, please refer to the online documentation (click here to open the [User Manual](#)).

#### Settings

---


- Show Only Changes
- Ignore Share Permissions 
- Include Default Groups (e.g. Everyone)
- Exclude Domain Administrators
- Show Only Groups

Figure 6 – Configuring the directory report: Configuring the settings

**Note:** By default, the *Show Only Changes* checkbox is enabled. This means that only those directories will be included in the report whose permissions with respect to their parent directory have changed. We recommend that you keep this setting in order to restrict the report output to the changes. This will reduce the report volume considerably. In addition, it is much easier to spot differences as only the deltas will be included in the report.



### 2.3.3 Display Options

The display options determine the level of detail for the representation of the permissions:

**Display Options**

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Show Effective Permissions

Show NTFS Permissions

Show Share Permissions

Special Permissions

Figure 7 – Configuring the directory report: Setting the display options

**Note:** Especially when forwarding reports to directory owners, enabling *Show Effective Permissions* as the one and only option has proved to be useful.

### 2.3.4 Other

You might want to select the report format that suits best your requirements. By default, *Horizontal Report* is enabled.

**Other**

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Report Format:

AD User as:

AD Property:

Figure 8 – Configuring the directory report: Other

**Note:** The *Vertical Report* is often a good choice for checking the current permissions because it neatly arranges the user permissions and the directory structure on two axes. If you choose this report format, we recommend that you select Excel format as the only format for report creation under *Advanced*.

### 2.3.5 User/Group Filter

The User/Group filter allows you to filter out users or groups, which will then no longer be included in a directory report, regardless of their permissions situation.

**User/Group Filter**

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List:

Search:


	NAME	RESOLVE RECURSIVELY	
	DSRA\Domain Admins	<input checked="" type="checkbox"/>	<input type="button" value="Remove"/>

Figure 9 – Configuring the directory report: User/Group filter

**Note:** If you need this filter feature for report creation, make sure to create all required filters beforehand. For a functionality description, refer to the [User Manual](#).

### 2.3.6 Scheduled Execution

In the Scheduling step, you can start the wizard for automated, scheduled report creation. It is not possible to create these reports interactively. The *Schedule Documentation* checkbox is permanently enabled and cannot be deselected.

## 2.4 Step 4 – Report

### 2.4.1 Specifying the Distribution Options

In the next step, enter the following information:

- “Distribution Options”: Here, you can deselect the cover sheet as well as the footer and header for your report, if desired.
- Configure the required output formats under “Advanced”.
- Under “Paper Size”, you can set the paper size (A4 by default).

Report Scheduling □ ×

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Company Selection      CSV Import      Directory Permissions      **Report**      Scheduling

---

**Distribution Options:**

Header     
  Footer     
  Show Cover

Paper Size:

**Distribution**

E-Mail Distribution

Subject:

**Advanced** ▾

Create DOCX

Create HTML

Create PDF

Create XLSX

Create ODT

Print Preparation (MDC)

Figure 10 – Configuring the report output – Distribution options

## 2.4.2 Configuring the E-Mail Distribution (Optional)

If you select "E-Mail Distribution", the generated reports will additionally be sent by e-mail in the format selected under *Advanced*. By default, this dialog includes a *Recipient* field. This field is omitted here as the e-mail address of the recipient is already known from the CSV import. The *Subject* and *Message* fields will be used for all reports created using this dialog.

Report Scheduling □ ×

1 Company Selection    2 CSV Import    3 Directory Permissions    **4 Report**    5 Scheduling

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**Distribution Options:**

Header     Footer     Show Cover    Advanced

Paper Size: A4

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**Distribution**

E-Mail Distribution

Subject:

Message:

Back    Next    Cancel

Figure 11 – Configuring the report output – E-mail distribution

## 2.5 Step 5 – Scheduling

In the last step, you configure the scheduled execution. For this example, we selected monthly reporting. DocuSnap will generate the reports every first Monday of a month at 07:00 o'clock and distributed them. For the creation, you must set a time window, as only one report is created at a time. For example, if 100 reports are scheduled, you should check after the first run how long it took to complete the entire report generation. This information can then be used to do a detailed planning in order to avoid that report generation overlap with other scheduled jobs.

Report Scheduling □ ×

1 Company Selection    2 CSV Import    3 Directory Permissions    4 Report    5 **Scheduling**

Schedule Documentation

Name: 

Schedule Type:

At every 1 of the month at 10:17:11. Schedule will be used from 03.10.2017.

**Frequency**

Interval:

Every  of the month

Every   of the month

**Starting Time**

Start Date:  Execution Time:

Figure 12 – Scheduling – Setting scheduled execution

Note: The “Name” field has a special function here because the name not only applies to one single report. For this reason, you need to specify a special prefix in the “Name” field that will precede every single generated report job name. The respective UNC path from the CSV file will then be appended to this prefix to make sure that the job names are unique.

## 2.5.1 Checking the Execution Status of Scheduled Reports

You can check at any time in the DocuSnap Job Management feature whether the reports were created successfully and how long generation took. For a description of the Job Management functionality, refer to the [User Manual](#).

Job Management □ ×

Scheduled Jobs

	NAME	COMPANY	DOMAIN	JOB STATUS	TYPE	PROGRESS	CREATION DATE	LAST EXECUTION	NEXT E
<input checked="" type="checkbox"/>	Monthly_Directory_Report_DirectoryReport_\\DSFS01.dsra.local\Accounting	DocuSnap AG		scheduled	Report		03.10.2017 10:18:20		01.11.2
<input checked="" type="checkbox"/>	Monthly_Directory_Report_DirectoryReport_\\DSFS01.dsra.local\Accounting\Global	DocuSnap AG		scheduled	Report		03.10.2017 10:18:20		01.11.2
<input checked="" type="checkbox"/>	Monthly_Directory_Report_DirectoryReport_\\DSFS01.dsra.local\Accounting\Munich	DocuSnap AG		scheduled	Report		03.10.2017 10:18:20		01.11.2

Figure 13 – Scheduling – Checking the execution status

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## VERSION HISTORY

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Date	Description
9/27/2017	1.0: initial version

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